



# Scan to SharePoint

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## Administrator's Guide

**Important:** This guide is intended for MX6500e.

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## Overview

*Scan to SharePoint* lets you securely scan documents to sites housed on SharePoint servers. Saved in SharePoint sites, it also allows site navigation and folder creation from the scanner and printing of documents from the printer.

Using the application, you can also scan documents to a Lexmark Document Distributor (LDD) server. LDD captures and converts paper documents into digital format, or captures existing digital documents and then processes and routes these documents according to your business processes. For more information on LDD, see the *Lexmark Document Distributor Administrator's Guide*.

A working knowledge of SharePoint is required for the effective use of this guide. This document does not include information pertaining to the installation and use of the SharePoint software. For more information, see your SharePoint documentation.

# Configuring Scan to SharePoint

## Accessing application configuration settings using the Embedded Web Server

**1** Obtain the scanner IP address:

- From the scanner home screen
- From the TCP/IP section in the Network/Ports menu
- By printing a network setup page or menu settings page, and then finding the TCP/IP section

**Note:** An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

**2** Open a Web browser, and then type the scanner IP address in the address field.

The Embedded Web Server appears.

**3** From the navigation menu on the left, click **Settings > Apps > Apps Management**.

**4** From the list of installed applications, click the application you want to configure, and then click **Configure**.

## Adding or editing a profile

**1** Access the application configuration settings from the Embedded Web Server.

**2** Add or edit a profile:

### Adding a profile

From the Configure page, click **Add**.

### Editing a profile

From the Configure page, select a profile to edit, and then click **Edit**.

**3** Change the settings if necessary.

- To customize the display text and icons, see “Customizing the display icon” on page 8.
- To set user authentication, see “Configuring user authentication settings” on page 5.
- To configure SharePoint settings, see “Configuring SharePoint settings” on page 5.
- To customize scan settings, see “Configuring scanning options” on page 6.
- To enable confirmation options, see “Configuring confirmation options” on page 7.

**4** If necessary, configure the proxy settings for the scanner. Type the proxy host name and port number used to connect to the server.

**5** Save or discard your changes.

## Configuring user authentication settings

- 1 Access the application configuration settings from the Embedded Web Server.
- 2 From the Configure page, add or edit a profile, and then customize the user authentication options.
  - **Authentication Type**—Select how users will be authenticated against the SharePoint server.

**Note:** Windows Server 2008 does not support NTLM Authentication. If your SharePoint server is running on Windows Server 2008, then select only **NTLMv2 credentials** or **Use MFP credentials** as the authentication type.

    - **Default NTLM User Name**—Type the default user name.
    - **Default NTLM Password**—Type the default password.
    - **Show NTLM User Name and Password**—Select this option to allow the user to change the default user name and password. If this option is not selected, then the user name and password authentication prompts will not be shown.
- 3 Save or discard your changes.

## Configuring SharePoint settings

- 1 Access the application configuration settings from the Embedded Web Server.
- 2 From the Configure page, add or edit a profile, and then customize the SharePoint options.
  - **Hostname**—Type the host name of the SharePoint server.
  - **Domain**—Type the Windows domain of the SharePoint server.
  - **SharePoint URL**—Type the URL of the SharePoint site where scanned documents are saved.

**Notes:**

- Do not include the default page or file name of the site when typing the URL. For example, to add the SharePoint URL `http://abcde/Docs/default.aspx`, type only `http://abcde/Docs/` in the SharePoint URL field.
- Do not include document libraries or folders when typing the URL.

- **URL scheme for My Site**—Customize the URL of the “My Site” site on your SharePoint server. By default, the URL is `%s/personal/%u`, where `%s` is the SharePoint server address and `%u` is the authenticated user name.
- **Filtered URLs**—Type a list of URLs of SharePoint sites or folders that are accessible to users from the scanner control panel.

**Note:** Do not include the default page or file name of the site when typing the URLs. For example, to prevent users from navigating to the site with the URL `http://abcde/Admin/default.aspx`, type only `http://abcde/Admin/` in the Filtered URLs field.

- **Default Start Location**—Type the URL of the SharePoint site or folder that you want users to start navigating from when using the application on the scanner.
- **Ask for check-in comment**—Select the check box to prompt users to type a comment when scanning documents to SharePoint.
- **Prompt for optional data**—Select the file information for which users will enter values after scanning documents to SharePoint.
- **Apply a timestamp to imported file name**—Select the check box to add a time signature to the file name of a scanned document.

- **Include User Name In File Name**—Select the check box to automatically add the user name at the beginning of the file name when saving the scan job.
- **Timestamp format**—Select the format of the time stamp to be added to the file name. This can be set if the “Apply a timestamp to imported file name” option is enabled.
- **Date Prompt Entry**—Select the method for entering the date and time information. If you select **Numeric Format**, then users will be asked to manually enter the date from the scanner control panel.
- **Date Prompt Format**—Select the date format. This applies only if the **Numeric Format** option is selected from the Date Prompt Entry menu.
- **Time Preference**—Select the time format. This applies only if the **Numeric Format** option is selected from the Date Prompt Entry menu.
- **Personal Site Use**—Select how users can access personal sites on SharePoint.
- **Enable Print**—Select the check box to let users print documents saved on SharePoint.
- **Enable Scan**—Select the check box to let users scan documents to sites on SharePoint.
- **Enable Forward to**—Select the destination for the scanned document.
- **LDD Forwarding**—If you chose to send scanned documents to LDD, then configure the following settings:
  - **Primary Server Address**—Type the IP address or host name of the primary LDD server that processes the scanned documents.
  - **Secondary Server Address**—Type the IP address or host name of the secondary LDD server that processes the scanned documents.
  - **Profile Name**—Type the name of the profile or the workflow solution to apply to the scanned documents sent to LDD.
  - **Username**—Type the user name needed to access the LDD server.
  - **Password**—Type the password needed to access the LDD server

3 Save or discard your changes.

## Configuring scanning options

- 1 Access the application configuration settings from the Embedded Web Server.
- 2 From the Configure page, add or edit a profile, and then customize the default scan options.
  - **Show Scan Settings**—Select to allow users to change the settings from the scanner control panel when scanning a document. Clear the check box to prevent users from changing the default settings when scanning a document.
  - **Show Scan Preview**—Select the check box to show the first page of the scanned document on the scanner display.
  - **Allow user to enter filename**—Select the check box to allow users to change the file name of their scan job before saving to SharePoint.
  - **Default Scan Filename**—Enter a default file name for every scan job.
  - **Scan Sides (Duplex)**—Allow users to scan one-sided or two-sided documents. Select **1 Sided** to scan only one side of the document. Select **2 Sided** to scan both sides.
  - **Enable Custom Job**—Select the check box to combine single or multiple scans from the automatic document feeder (ADF) and the scanner glass into a single job. Enabling this setting will prompt users whether to scan their documents from the ADF or the scanner glass.

- **Scan Resolution**—Adjust the default quality of the scanned document. If users will be scanning photographs, drawings with fine lines, or documents with very small text, then increase the resolution setting. Higher resolution settings result in larger file sizes and longer time needed to scan the original document.
- **Scan Color**—Determine whether the document will be scanned in color or in black and white. Select this option to scan in color, or clear it to scan in black and white.
- **Scan Contrast**—Specify a setting to increase or decrease the difference between lights and darks in a scanned image. Select **Best for Content** if you want the scanner to adjust the contrast automatically, or select a value from 0 (least contrast) to 5 (most contrast).
- **Scan File Format**—Specify the output format for scanned images saved on the SharePoint server.

**Note:** The JPEG file format does not support multiple pages. If users will be scanning documents containing more than one page, then select either **TIFF** or **PDF** as the scan file format.

- **Content Type**—Select the default type that best represents the scanned document.
- **Background Removal**—Specify the degree of background to remove from the scan job. Type values from 1 to 10, with 10 for maximum background removal.
- **Shadow Detail**—Specify the degree of shadow detail to apply to the scan job. Type values from 1 to 10, with 10 for maximum shadow detail.

**3** Save or discard your changes.

## Configuring confirmation options

- 1 Access the application configuration settings from the Embedded Web Server.
- 2 From the Configure page, add or edit a profile, and then customize the confirmation options.
  - **Display Confirmation Page**—Select this option to specify that users will see a confirmation page on the scanner control panel after scanning documents to the SharePoint server.
  - **Print Confirmation Page**—Select this option to specify that the printer will print a confirmation page after users scan documents to the SharePoint server.
  - **Email Confirmation Page**—Select this option to specify that the scanner will send a confirmation e-mail after users scan documents to the SharePoint server. Addresses for recipients must be specified in the “Email To” field.
  - **Email To**—If you select the **Email Confirmation Page** option, then you must specify at least one recipient's e-mail address in this field. Multiple addresses should be separated by commas.

**3** Save or discard your changes.

## Deleting a profile

- 1 Access the application configuration settings from the Embedded Web Server.
- 2 From the Configure page, select a profile from the list, and then click **Delete**.
- 3 Click **Delete** to confirm.

## Customizing the display icon

- 1** Access the application configuration settings from the Embedded Web Server.
- 2** From the Configure page, add or edit a profile, and then change the settings if necessary:
  - **Button Text or Text**—Type up to 20 characters that will appear above the profile button on the scanner home screen. This field is optional.
  - **Button Icon or Icon**—Browse to a new image file that represents the profile on the scanner home screen. This field is optional.
  - **Button Icon when pressed or Icon when pressed**—Browse to a new image file that will appear while the profile icon is being pressed. This field is optional.
- 3** Save or discard your changes.

# Configuring PKI Authentication

**Note:** If you plan to attach a SmartCard reader to your scanner, then install and configure PKI (*public key infrastructure*) applications to the devices.

Use Lexmark PKI applications on supported Lexmark devices to take advantage of the enhanced security features of the PKI capabilities of your network. The applications include:

**PKI Authentication**—This provides the mechanism for authenticating and authorizing scanner users.

**PKI S/MIME Email**—This enables users to sign and encrypt e-mail messages.

**PKI Scan to Network**—This enables users to scan documents to a network file share.

**PKI Held Jobs**—This holds print jobs securely at the scanner until released by an authorized user. This application is also called Print Release Lite.

The PKI Authentication application is required, but all other applications are optional and can be installed as needed.

For information on setting up PKI-enabled devices and PKI Authentication, see the *Pre-Installation Guide* and the *Installation and Configuration Guide* that came with the PKI applications package.

# Using Scan to SharePoint

After the application is installed, the scan features on the scanner will behave differently when users scan to a SharePoint server using a Scan to SharePoint profile. Within each profile, the prompts that users will see are determined by settings configured by the administrator. Therefore, users may not see all of the prompts described here when using a particular profile.

## Scanning documents using Scan to SharePoint

**Note:** To scan documents to a site or folder on SharePoint, make sure scanning is enabled from the EWS application configuration page.

- 1 Load the document.

**Note:** Documents may be loaded into the automatic document feeder (ADF) or the scanner glass. For information on the different methods of loading documents, see the *User's Guide* that came with the scanner.

- 2 Touch the application profile icon.
- 3 Type your user name and password, or swipe your badge ID, and then type your password.
- 4 Navigate to the site or folder where you want to save the scanned document, and then select it.
- 5 To create a new destination folder, touch the **Create Folder** icon, and then enter the name of the folder.

**6** Touch **Next > Scan**.

- 7 If necessary, type the file name of your scanned document, and then touch **Next** to send the scan job to SharePoint.
- 8 Depending on how the application is configured, you may be prompted to adjust the scan settings. Adjust the settings if necessary, and then touch **Scan It**.

If Custom Job is enabled, then you may be prompted to select whether to scan from the ADF or from the scanner glass. Select the location of your original document.

- 9 To scan additional documents, load the next document, and then touch **Scan the Next Page**.

If Custom Job is enabled, then you may be prompted to select whether to scan from the ADF or from the scanner glass again. Select the location of your additional documents.

- 10 If you have no more documents to scan, then touch **Finish the Job**.

- 11 Depending on how the application is configured, some additional job options may be asked when scanning a document to SharePoint. Follow the prompts on the screen to customize the options or enter the necessary information.

**Note:** Optional information are configured by creating site columns from the SharePoint Web server. All column types, except Calculated Columns, are supported by the application. For more information on site columns, see your SharePoint documentation or contact your system support person.

## Printing documents saved on SharePoint

**Note:** To print documents saved on a SharePoint site or folder, make sure printing is enabled from the EWS application configuration page.

- 1 Touch the application profile icon.
- 2 Type your user name and password, or swipe your badge ID and type your password.
- 3 Navigate to the SharePoint site or folder where your document is saved.  
To open your personal site or folder, touch **My Site** from the navigation bar.
- 4 Select the document that you want to print.
- 5 To view information about the file, touch the **Info** icon.
- 6 To print the document, touch **Print**.

# Troubleshooting

## An application error has occurred

Try one or more of the following:

### CHECK THE SYSTEM LOG

- 1 Obtain the scanner IP address:
  - From the scanner home screen
  - From the TCP/IP section in the Network/Ports menu
  - By printing a network setup page or menu settings page, and then finding the TCP/IP section

**Note:** An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

- 2 Open a Web browser, and then type the scanner IP address in the address field.  
The Embedded Web Server appears.
- 3 From the navigation menu on the left, click **Settings > Apps > Apps Management**.
- 4 Click the **System** tab > **Log**.
- 5 From the Filter menu, select an application status.
- 6 From the application menu, select an application, and then click **Submit**.

### ADJUST THE SCAN SETTINGS

In the application configuration settings, select a lower scan resolution. You can select **Off** or a lower resolution from the Scan Color menu.

### CONTACT YOUR SOLUTIONS PROVIDER

If you still cannot isolate the problem, then contact your solutions provider for additional help.

## Application cannot authenticate user

Try one or more of the following:

### CHECK THE APPLICATION SETTINGS

Make sure the authentication options and SharePoint settings in the application configuration settings match the settings for the SharePoint server. For more information about configuring Scan to SharePoint settings, see “Configuring SharePoint settings” on page 5.

## MAKE SURE SCANNER AUTHENTICATION IS CONFIGURED

If the application is configured to use scanner authentication credentials, then the scanner authentication settings must be configured from the Embedded Web Server. For more information on configuring the scanner authentication settings, see the *Embedded Web Server Administrator's Guide* available at [www.lexmark.com](http://www.lexmark.com).

## MAKE SURE YOU SPECIFY THE CORRECT USER NAME AND PASSWORD

If the application is configured to use SharePoint credentials to authenticate users, make sure to type the correct user name and password combination from the application configuration settings.

## CONTACT YOUR SOLUTIONS PROVIDER

If you still cannot isolate the problem, then contact your solutions provider representative for additional help.

# Application cannot connect to SharePoint server

Try one or more of the following:

## CHECK THE APPLICATION SETTINGS

Make sure the application settings match the settings for the SharePoint server. For more information on configuring Scan to SharePoint settings, see "Configuring SharePoint settings" on page 5.

## MAKE SURE THE SCANNER IS CONNECTED TO THE NETWORK

Make sure all appropriate network cables are securely connected and the network settings of the scanner are correctly configured. For information on networking the scanner, see the scanner *User's Guide* or the *Software and Documentation CD* that came with the scanner.

## CHECK THE SYSTEM LOG

**1** Obtain the scanner IP address:

- From the scanner home screen
- From the TCP/IP section in the Network/Ports menu
- By printing a network setup page or menu settings page, and then finding the TCP/IP section

**Note:** An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

**2** Open a Web browser, and then type the scanner IP address in the address field.

The Embedded Web Server appears.

**3** From the navigation menu on the left, click **Settings > Apps > Apps Management**.

**4** Click the **System** tab > **Log**.

**5** From the Filter menu, select an application status.

**6** From the application menu, select an application, and then click **Submit**.

## Users cannot access a site or site does not appear on the list

Try one or more of the following:

### CHECK THE APPLICATION SETTINGS

Make sure that the application settings match the settings for the SharePoint server. For more information about configuring Scan to SharePoint settings, see “Configuring SharePoint settings” on page 5.

### MAKE SURE THE SITE IS VALID

Check that the site or folder was created properly, and that users are able to scan and view documents for this folder from the server Web site.

If users cannot scan or view files from the server Web site, then make sure they have appropriate access to the site or folder.

### MAKE SURE USERS HAVE APPROPRIATE ACCESS TO THE SITE

Make sure users have privileges to scan to the SharePoint server, print files, view file information, or create folders within a site.

### CONTACT YOUR SOLUTIONS PROVIDER

If you cannot isolate the problem, then contact your solutions provider representative for additional help.

## Cannot scan or print documents

### MAKE SURE SCANNING OR PRINTING IS ENABLED

Select the **Enable Scan** or **Enable Print** check box from the SharePoint settings on the EWS application configuration page. For more information, see “Configuring SharePoint settings” on page 5.

### IF YOU CANNOT PRINT A PDF FILE, THEN MAKE SURE IT IS NOT ENCRYPTED

Secure PDF files or PDF files with passwords cannot be printed using the application. These are not supported on devices running the Embedded Solutions Framework.

To print PDF files using the application, make sure the files can be opened without the need for passwords.

### MAKE SURE USERS HAVE APPROPRIATE ACCESS TO THE SITE

Make sure users can scan to the SharePoint server or print files saved on SharePoint.

## MAKE SURE YOUR LDD SETTINGS ARE CORRECT

If you are scanning documents to an LDD server for processing and routing, then make sure the server settings and user credentials on the application configuration page are correct. For more information on using LDD, see the *Lexmark Document Distributor Administrator's Guide*.

## Documents are not scanning in color

### CONFIGURE THE APPLICATION TO SCAN DOCUMENTS IN COLOR

- 1 Access the application configuration settings from the Embedded Web Server.
- 2 From the Scan Color menu, select **On**.
- 3 Click **Apply** or **OK** to save the changes.

# Appendix

## Exporting and importing a configuration using the Embedded Web Server

You can export configuration settings into a text file, and then import it to apply the settings to other devices.

- 1 From the Embedded Web Server, click **Settings > Apps > Apps Management**.
- 2 From the list of installed applications, click the name of the application you want to configure.
- 3 Click **Configure**, and then do either of the following:
  - To export a configuration to a file, click **Export**, and then follow the instructions on the computer screen to save the configuration file.  
**Note:** If a **JVM Out of Memory** error occurs, then repeat the export process until the configuration file is saved.
  - To import a configuration from a file, click **Import**, and then browse to the saved configuration file that was exported from a previously configured device.

**Notes:**

- Before importing the configuration file, you can choose to preview it first.
- If a timeout occurs and a blank screen appears, then refresh the Web browser, and then click **Apply**.

## Checking which version of the Embedded Solutions Framework is installed on a scanner

- 1 Obtain the scanner IP address:
  - From the scanner home screen
  - From the TCP/IP section in the Network/Ports menu
  - By printing a network setup page or menu settings page, and then finding the TCP/IP section**Note:** An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.
- 2 Open a Web browser, and then type the scanner IP address in the address field.
- 3 From the Embedded Web Server, click **Reports > Device Settings**.
- 4 Scroll down until you see “Embedded Solutions” (usually found near the bottom).
- 5 In the Embedded Solutions section, note the value next to “Framework =”. This signifies the installed version.

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